



# Identifying and Managing Customer Expectations

## Zimmer Biomet On-Demand Learning Participant Guide

Living the Zimmer Biomet Value: Customers First



## INTRODUCTION

### Identifying and Managing Customer Expectations

Understanding your customers' expectations and behaviors is essential to implementing a successful customer-focused service approach. But how do you get to the core of what your customers truly value? This course explores what customers value from a service perspective and how to identify their needs and expectations. It also examines how you can use customer relationship management tools to help identify and manage customer expectations in order to maintain competitive advantage.

### Learning Objectives

After completing this topic, you should be able to:

- Match ways of getting feedback from customers to when it's appropriate to use each technique
- Apply the steps involved in exploring customers' needs in a given scenario
- Recognize how CRM helps you manage customer expectations
- Practice and apply learnings at work

### Who should complete Identifying and Managing Customer Expectations?

Managers and leaders who want to develop their skills for approaching and implementing customer-focused service strategies.

### Approximate Duration

1 hour online time

1-2 hours to complete Participant Guide Actions

1 hour post-learning "Putting-It-All-Together" Discussion

## ZIMMER BIOMET’S APPROACH TO ON-DEMAND LEARNING

**Part 1:** The **On-Demand Course** includes all the modules you complete on your computer. You go through the self-paced course online, complete the required work, actions and assessments.

**Part 2:** As you complete the online course, you will work at the same time in this **Participant Guide**, which includes additional interactive exercises, though-provoking questions, discussions with co-workers and your manager, note-taking opportunities and more. It prompts you to consider situations you’re facing at work and apply what you’ve learned from the on-line course. It helps you remember key points via a useful job aid that you can post at your desk.

**Part 3:** Finally, you will have the opportunity to participate in a **Putting-It-All-Together** on-line discussion. This creates a learning community, bringing together other Zimmer Biomet employees who have completed the on-line course. Within 10 business days of finishing this course, you will receive an email with instructions on how to participate in the follow-up discussion designed to help you reinforce key concepts and share best practices.

### On-Demand Courses Reinforce Zimmer Biomet Values

On-Demand courses at Zimmer Biomet support and reinforce the Zimmer Biomet Values. Employees at all levels are expected to demonstrate behaviors and characteristics associated with each: Customers First, Do the Right Thing, Innovate and Improve, Win Through Results, Positive Culture, and One Zimmer Biomet.

<p><b>Customers First</b></p>	<p>We actively pursue ways to earn trust and exceed expectations in every Customer interaction.</p> <ul style="list-style-type: none"> <li>• We listen to understand and anticipate our Customers’ needs</li> <li>• We are deliberately responsive and always keep our commitments</li> <li>• We act as if each patient is a member of our own family</li> </ul>
<p><b>Do the Right Thing</b></p>	<p>We hold ourselves to the highest standard of quality and integrity in everything we do.</p> <ul style="list-style-type: none"> <li>• We adhere to the highest ethical standards in dealing with others</li> <li>• We ensure consistency between our words and actions</li> <li>• We are personally accountable for doing our work right the first time and every time</li> </ul>
<p><b>Innovate and Improve</b></p>	<p>We are driven to develop innovative solutions that make a difference and to continuously improve performance.</p> <ul style="list-style-type: none"> <li>• We ask: “How can we do this better?”</li> <li>• We empower Team Members to make decisions and solve problems</li> <li>• We embrace prudent business risks and maintain a bias for taking action</li> </ul>
<p><b>Win Through Results</b></p>	<p>We are accountable for delivering on our commitments and recognize that success requires a winning attitude, discipline and a sense of urgency.</p> <ul style="list-style-type: none"> <li>• We set and reward high performance standards for our business and our Team Members</li> <li>• We acknowledge reality and focus on finding solutions when faced with obstacles</li> <li>• We cultivate a “can do” attitude and own the execution of our plans</li> </ul>

**Positive Culture**

We are optimistic, curious, and committed in our interactions with others.

- We listen and respect other points of view
- We create a positive environment where people feel appreciated and recognized
- We actively seek and give meaningful, appreciative and constructive feedback

**One Zimmer Biomet**

We collaborate for the greater good in a global company that is united by Our Purpose.

- We believe diversity of thought, style and background on our team enables the fulfillment of Our Purpose and Our Mission
- We always strive to live Our Values in our interactions with one another
- We recognize that Zimmer Biomet is our first team and prioritize the company over individual success

Each year, you are rated on your performance (the work you do toward your goals and objectives) and on the Zimmer Biomet Values (how you do that work). To that end, Zimmer Biomet is committed to providing you training and career development in support of the Zimmer Biomet Values.

Each On-Demand Learning course supports a primary Value, and the actions you will complete in the On-Demand Learning Participant Guide have been designed to support aspects of all the Values. The primary Value supported in this On-Demand course, Identifying and Managing Customer Expectations, is

**Customers First**

We actively pursue ways to earn trust and exceed expectations in every Customer interaction.

- We listen to understand and anticipate our Customers' needs
- We are deliberately responsive and always keep our commitments
- We act as if each patient is a member of our own family










As you complete the work in the Participant Guide, think about all of the Zimmer Biomet Values and how the actions help drive important behaviors.

## GETTING STARTED

### How the Participant Guide is Organized:

It's easy to follow along and complete work in the Participant Guide while doing the online modules.

1. Read pages 3-6 of the Participant Guide
2. Answer the pre-course questions on page 7
3. After you complete these questions you'll see the "Start!" Icon (Rocket Ship), which will instruct you to go to the online learning and complete certain sections in the course
4. After you complete the online sections as instructed, return to the Participant Guide and complete the next series of actions
5. In the Participant Guide, the types of actions you'll complete are indicated by the following icons:

 <b>Write it Down</b>	 <b>Think About</b>	 <b>Key Points to Remember</b>
 <b>Highlight It</b>	 <b>Go Do This</b>	 <b>Helpful Tools</b>
 <b>What I Will Do Differently</b>	 <b>Start!</b>	 <b>Top Takeaways</b>

\* Some or all of these icons will be used within the Participant Guide.

## PRE-COURSE ACTIONS



Write down your thoughts as you prepare to learn about customer-focused strategies. List the top three things going on now within your business or job that makes this On-Demand Course important to you? What has driven you to take this course?

1.

2.

3.



Think about your role within the organization and identify who your customers are. Do you know the current needs of your customer base? Do you take your customer's needs into account when carrying out your daily responsibilities? Write down your thoughts. Keep these in mind as you go through the course.



Proceed to the online learning. Upon completion of the online sections bulleted below, return to this Guide and complete the segment of actions that follow.

- **Module I: Course Overview**
- **Module II: Recognizing Customer Needs and Expectations**

## MODULES I & II: COURSE OVERVIEW & RECOGNIZING CUSTOMER NEEDS AND EXPECTATIONS – ACTIONS



Customer-centric organizations attempt to meet customer needs and expectations by listening to the feedback they receive. They commit themselves to understanding their services from the customers' perspective. Companies cannot just listen, they must act on what customers tell them.



During your customer interactions, have you ever received or solicited feedback from a customer? Did the customer provide you with their needs and expectations? If so, describe how their feedback might have changed the way you interacted with the customer in the future.

Have you ever experienced a time when you or someone in your department did not quickly respond to a customer's needs or feedback? What was the result and how did it affect the relationship with the customer?



If you are unsure on how to solicit feedback from a customer, here are 5 useful ways to gather feedback:

1. Observation
2. Focus Groups
3. Surveys
4. Sales and Customer Service employees
5. Web, e-mail, and social networking



Highlight which of these tools you would be most likely to use when soliciting feedback from your customers? Based on your customer base, why do you feel these tools would be the best way to receive feedback?



Proceed to the online learning. Upon completion of the online sections bulleted below, return to this Guide and complete the segment of actions that follow.

- **Module III: Exploring Customer Needs**



## MODULE III: EXPLORING CUSTOMER NEEDS – ACTIONS



Create a list of questions that you would use in a survey to capture the voice of your customers. Create questions that correspond to the four basic steps outlined in the On-Demand session. Use the “Understanding Customer Needs” Skillbrief from the On-Demand session as reference.

### Current and Desired Situation

### Identify Desired Situation

### Investigate Past Experiences

### Conduct Gap Analysis

Supply Gaps – Investigate whether there are demand gaps that you can fill

Demand Gaps – Investigate what ways you can enhance your offering to increase its value



Schedule a lunch or other relaxed time with 2 or more sales or customer service employees from your department that interact with customers on a daily basis.

- Discuss with them how they earn trust and exceed expectations in every customer interaction. Listen to the troubles they may face when meeting the customer’s expectations and share with them what you have learned on exploring customer needs and how to ask the right questions.



Proceed to the online learning. Upon completion of the online sections bulleted below, return to this Guide and complete the segment of actions that follow.

- **Module IV: Managing Customer Expectations**

## MODULE IV: MANAGING CUSTOMER EXPECTATIONS – ACTIONS



Customers' expectations of the companies they do business with have evolved over time. They now want a collaborative relationship with transparency and accountability. Their needs and their expectations may also change over time.

Think about a time in which one of your customers changed or increased their expectations of you or your department. What strategy would you now use in order to manage your customer's changing needs and expectations?



Sometimes competitors make promises they cannot keep and it may be possible to swoop in and "rescue" a customer from a bad experience. Have you ever been able to "rescue" a customer from a competitor?

Similarly, you may have to tell a customer "No" in order to avoid making promises that you or your department may not be able to keep. Have you ever had to say "No" to a customer?

How do either of these experiences reflect Zimmer Biomet's value of actively pursuing ways to earn trust and exceed expectations in every customer interaction?

In what ways have you or your department been successful in keeping promises to your customers?



Based on your learnings from this On-Demand session and Zimmer Biomet's Customer First Value, what will you do differently when managing your customer's expectations? How will you incorporate the CRM data?



Within 10 business days of completing this course, you will receive an email with instructions on how to participate in the follow-up discussion. Please hold onto the work you have completed in this Participant Guide so that you can refer to it then.



# TOP TAKEAWAYS:

## Identifying and Managing Customer Expectations

Following are the top things to remember from the course, **Identifying and Managing Customer Expectations:**

Customer-centric companies know that their customers are the lifeblood of their business and they are always making efforts to anticipate customers' needs and exceed their expectations. They commit themselves to understanding their services from the customer's perspective.

Recognizing Customer Needs and Expectations	Exploring Customer Needs
<p>Customer-centric organizations attempt to meet customers' needs and expectations by listening to the feedback they receive. You <b>cannot just listen</b> to the customer, you <b>have to act</b> on what the customers tell you.</p> <p><b>Five useful ways to gather customer feedback:</b></p> <ul style="list-style-type: none"> <li>• <b>Observation</b> – Note how customers search for, purchase, and use your product or service</li> <li>• <b>Focus Groups</b> – A representative sample of customers, or potential customers, gathered to discuss certain elements of a product or service, guided by a moderator.</li> <li>• <b>Surveys</b> – Used when you require quantitative information about what you are doing well and where issues are forming. Can use online surveys or mail surveys.</li> <li>• <b>Sales and Customer Service employees</b> - Frontline employees are best placed to talk to customers face-to-face about how they feel regarding your product or service. Queries can be dropped into conversation in a natural and noninvasive way.</li> <li>• <b>Web, e-mail, and social networking</b> – Customer measures can be calculated via online interactions. You can determine site visit traffic statistics or conversion rates</li> </ul>	<p>In order to maintain a competitive edge, companies must have a clear picture of what their customers really want and actually buy.</p> <p><b>Guidelines for asking appropriate questions:</b></p> <ul style="list-style-type: none"> <li>• Start with broad questions and then get specific</li> <li>• Build on previous responses</li> <li>• Focus on customer's desired benefits</li> </ul> <p><b>4 Basic Steps to explore customers' needs:</b></p> <ul style="list-style-type: none"> <li>• <b>Investigate Current Situation</b> – determine their needs and discover their urgency in buying and criteria for buying</li> <li>• <b>Identify Customer's Desired Situation</b> – explore what they would like to achieve and determine what benefits that are important to them</li> <li>• <b>Investigate Customer's Past Experiences</b> – Emphasize why your service is different</li> <li>• <b>Carry out a Gap Analysis</b> – look for supply and demand gaps and address how you can help each customer specifically</li> </ul>
Managing Customer Expectations	
<p>Companies need to know what customers want so they can focus their offerings to make the most profit possible.</p> <p><b>Strategies to manage customer expectations:</b></p> <ul style="list-style-type: none"> <li>• Know what your customers value</li> <li>• Watch Competitors</li> <li>• Say "No" if needed to avoid making promises you cannot keep</li> <li>• Keep your promises</li> <li>• Leverage CRM data</li> </ul>	

This course is part of the Learn and Live the Values program and can be accessed at <http://zimmerbiomet.skillport.com>